



FIRST REPUBLIC BANK

Quicken for Mac 2007 – Web Connect

The following instructions are provided by Quicken for clients who use these services. To ensure the service continues to operate properly after your upgrade to the new First Republic digital banking experience, we ask that you please follow the steps below. We greatly appreciate your understanding.

Upgrade Instructions

As you upgrade to the new digital banking experience, you will need to modify your Quicken settings to ensure a smooth transition of your data. To complete these instructions, you will need your First Republic online banking username and password.

NOTE: It is important that you perform the following instructions exactly as described and in the order presented. Otherwise, your service may stop functioning properly. This conversion should take 15– 30 minutes.

Documentation and Procedures

Task 1: Upgrade Preparation

1. To ensure your data remains intact, please back up your data file. For instructions on how to do this, please choose the **Help** menu > **Search**. Search for “**Backing Up**,” select **Backing Up Your Data** and follow the instructions.
 2. Once the backup is complete, please download the latest Quicken update. For instructions to download an update, choose the **Help** menu > **Search**. Search for “**Updates**,” select **Checking for Updates to Quicken**, and follow the instructions.
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Task 2: Now that you have upgraded to the new digital banking experience, Deactivate Your Account(s) labeled **First Republic Bank** within Quicken

1. Choose **Lists** menu > **Accounts**.
2. Select the account to deactivate and click **Edit**.
3. In the **Download Transactions** drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.
4. Remove the information within the **Financial Institution** fields.
5. Click **OK** to save your edits.
6. Repeat steps 2-5 for each First Republic account.
7. Verify your account list does not display a blue online circle icon for the accounts you are deactivating.



Task 3: Now it's time to reactivate Your Account(s)

1. Download your Quicken Web Connect file from First Republic online.

IMPORTANT: Take note of the date you last had a successful connection. If you have overlapping dates in the Web Connect import, you may find duplicate transactions.

2. Import your transactions to Quicken.
3. Associate the account to the appropriate account already listed in Quicken. Select **Use an existing account**.
4. Match the transactions you are importing to the corresponding existing Quicken account in the drop-down list and click **OK**.
5. Repeat steps for each account you are reactivating.
6. Choose **Lists** menu > **Accounts**. Verify each First Republic account has a blue online circle indicating it has been reactivated for online services.

Thank you for making these important changes!

Please contact Online Banking Support at (855) 886-4819 for assistance.